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The CFP Board's new ad, "Dive," premieres March 9, 2026.
Courtesy photo

CFP Board launches new 'Dive' ad in \$27M awareness campaign

By Rob Burgess

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Today the CFP Board launched a new ad in its ongoing "It's Gotta Be a CFP" campaign aimed at boosting consumer trust and visibility of the CFP designation.

The ad is part of a broader 2026 marketing push by the nonprofit, which has a \$27.1 million media budget this year for its public awareness efforts. The \$14.6 million spring campaign includes broadcast and cable TV spots as well as promotions across streaming, radio, digital and other channels and will run from March 9 to May 17.

The latest spot, called "Dive," features a man in a rowboat with a clearly unqualified dive instructor. After the instructor scoffs at the man's concerns about an empty oxygen tank, the man nervously asks, "Are you certified for this?" He closes his eyes in fear — and when he opens them, the scene is revealed to have been all in his head.

Instead, the man is in a tidy office, where he asks the woman across the desk: "Are you a certified financial planner?" When she confirms she is a CFP, the man is visibly relieved.

Newly appointed CFP Board CEO K. Dane Snowden previewed the ad in a March 5 webinar, where he was joined by James Katsaounis, managing director of marketing and communications, and Lori Loker, director of advertising.

The trio also discussed the organization's media budget and strategy. Of the \$27.1 million budget, 55% will be spent on broadcast and cable TV and 22% will go toward ads on connected TV and streaming.

While the CFP Board has traditionally focused on springtime campaigns, this year's strategy includes a "strategically timed" autumn ad push.

"We've always maintained an evergreen presence through paid social and digital media throughout the year," Snowden said in the webinar, "but adding a more robust fall investment, including broadcast and connected TV, truly turns this into a year-round campaign."

Snowden also said during the webinar that a 2025 CFP Board survey of CFP professionals found that 85% rated increasing understanding of CFP certification and building the brand as "very important."

Despite the public awareness campaign's expansion, some CFP professionals remain skeptical of the CFP Board's marketing strategy.

In 2024, the CFP Board released a campaign aimed at students called "Quite Possibly the Perfect Job." The goal was to draw more young people into the profession, but the response from established advisors was largely negative, with the ads receiving significant blowback from CFPs.

Not everyone is sold

Samantha Mockford, associate wealth advisor with Citrine Capital in San Francisco, said she does not think the CFP Board's recent campaigns are a good use of its funds.

"It sickens me to think that I spent so much time, effort and money preparing for a grueling exam, only to receive marks that are losing prestige each year," she said.

Mockford took particular issue with the CFP Board ads that highlight the average pay for CFPs, as spots in the "Quite Possibly the Perfect Job" campaign did. The CFP Board eventually revised that campaign in response to complaints that it portrayed advisors in a negative light.

"This underrepresents fee-only service providers who are just starting out and earning modest or no income, choosing that difficult path because they are motivated to help people," she said. "Ads like these might attract people, but they will be the wrong type, fueled by unsustainable motivations."

'We listened a lot': CFP Board

Other CFPs have raised similar concerns. Joshua Knauss, a financial planner and CFP with the Lewisburg, Pennsylvania-based Omniwealth Group, said he does not agree with the CFP Board's marketing direction or last year's increase of its

annual certification fee by \$120, up to \$575.

"The CFP Board should focus on the credibility of the designation and the need for the financial services industry to have a trusted designation similar to accounting and legal professions," Knauss said. "I believe the designation gains credibility through meaningful differentiation — for example, harder to get but not necessarily more expensive to get."

The public awareness campaign, under which the brand-new ad falls, and the "workforce" campaign, which included the "Quite Possibly the Perfect Job" ads, operate on separate funding streams. Jane Riley Jacobsen, CFP Board director of public relations, clarified that certification fees fund the public-awareness ads, while workforce efforts are funded by registered program, exam and continuing education provider fees.

In an interview with Financial Planning, Snowden said the CFP Board "learned a lot" from the fallout of the "Quite Possibly the Perfect Job" ads and retooled that campaign and those that followed to reflect those concerns.

"We listened a lot," he said. Those learnings are reflected in the new "Dive" spots. "This [public awareness] campaign is specifically targeted at creating greater awareness about CFP professionals to ensure that people know what CFP professionals do and how they are the standard for the financial planning profession."

Snowden said addressing CFPs' concerns were also part of the reason behind the public awareness campaign.

"We heard from many people like Joshua, who said, 'I love my CFP [certification] and I want more people to know about it,'" he said. "That's exactly why we're spending so much time and effort on public awareness, so that people do know about it."